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WORKPLAN DEVELOPMENT

ISSUES	RECOMMENDATIONS	NEXT STEPS/TIMING
TARGETING PROMOTIONS	DM, CAM, RM: IDENTIFY ACCOUNTS TO RECEIVE SPECIFIC PROMOTIONS UTILIZE APPROPRIATE DELIVERY VEHICLES • SALES REPS - ROM/PROMOTION COORDINATOR ADMINISTERS DELIVERY OF PROMOTION MATERIALS TO DIVISION WAREHOUSE • VAP - ROM/PROMOTION COORDINATOR ADMINISTERS VAP TO COORDINATE DELIVERY OF PROMOTION PRODUCT AND MATERIALS TO THE PROPER ACCOUNTS - HANDLE VAP AS A METHOD OF DELIVERY (NOT AS A "PROMOTION INDICATOR")	SALES PLANNING TO COORDINATE REVISIONS TO VAP • SEEK FIELD INPUT • SET GUIDELINES • UPDATE AS NEEDED TIMING: IN PROGRESS
NATIONAL PLANNING TIMETABLES	QUARTERLY WORK PLAN SENT TO FIELD 1ST WEEK OF FEBRUARY, MAY, AUGUST, NOVEMBER . . . • ALLOCATIONS AT ROU: 1ST MONDAY OF EACH MONTH • PROVIDE 8-WEEK LEAD TIME	SALES PLANNING TO FINALIZE AND COMMUNICATE WORK PLAN TIMETABLES TIMING : IN PROGRESS
WORKPLAN COMMUNICATIONS	COMMUNICATED FROM W-S SIMULTANEOUSLY TO RM AND ROU	ESTABLISH 2-WAY CONTACT LISTING FOR VARIOUS INTERNAL DEPARTMENTS AND FOR FIELD SALES (SEE "COMMUNICATIONS ISSUES") TIMING: JANUARY 1994

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COMMUNICATIONS

ISSUES	RECOMMENDATIONS	NEXT STEPS/TIMING
COMPLEXITY OF FIELD SALES COMMUNICATION	ELIMINATE MULTIPLE COMMUNICATION METHODOLOGIES RATIONALE: NO LONGER APPROPRIATE DISTRIBUTION PROCESS: CATEGORY A: REGION OPS UNITS ONLY ROUTINE INFO E-MAIL CATEGORY B: FIELD MANAGEMENT GENERAL INFO E-MAIL, US MAIL CATEGORY C: ALL EMPLOYEES GENERAL INFO E-MAIL, US MAIL	TIMING: JANUARY 1994
INTERNAL/EXTERNAL (HOME OFFICE) COMMUNICATIONS	ALL DEPARTMENTS WILL BE DIRECTED TO ROUTE CORRESPONDENCE THROUGH THE APPROPRIATE REGION OPS UNIT	TIMING: TO BE COMMUNICATED JANUARY 1994 (JOHN OLENICK)
ROLE AND INTERACTION OF ROM AND DIRECTOR OF AREA OPERATIONS 51842 7851	ROM INTERACTS WITH DAO TO COORDINATE: • CHANGES IN WORKPLAN DIRECTION • UNPLANNED OPPORTUNITIES • RSM APPROVED ROM INTERACTS WITH WINSTON-SALEM CONTACT • UNCLEAR PROGRAM COMMUNICATIONS • IMPLEMENTATION/EXECUTION PROBLEMS NOTE: DM CHANNELS ALL ABOVE PROBLEMS THROUGH ROU	TIMING: IMMEDIATE

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SYSTEMS

ISSUE	RECOMMENDATION	NEXT STEPS/TIMING
CAM/DM PRINT REPORT CAPABILITY	SET UP ALTERNATE PRINT DESTINATION FOR ALL CAM/DM LOCATIONS TO ACCESS: • ALL SIS FIELDS • SMS: VIEW CAPABILITY ONLY (ORDER ACCESS AT ROU ONLY) LONG-TERM VISION: CAM'S/DM'S WITH LAP-TOP COMPUTERS USING "DIAL-IN" TECHNOLOGY TO ACCESS THE APPROPRIATE REPORTS	IR (TONY MARSHALL) TO SET-UP ALTERNATE PRINT DESTINATION FOR ALL CAM/DM LOCATIONS TIMING: JANUARY '94 COMPLETE THE REDEFINITION OF RSM/CAM/DM ROLE AS MANAGER, THEN RE-ENGINEER A FRONT-END MENU OF SIS REPORTS THAT ARE APPROPRIATE AND NECESSARY TO MANAGEMENT TIMING: ROLE DEFINITION: MARCH '94 FRONT END MENU: MID-YEAR '94 LAP-TOP COMPUTER: MUST BE COST JUSTIFIED
SIS REPORT ENHANCEMENT (FYI)	CAPABILITY TO REQUEST SIS REPORTS BY SPECIFIC EMPLOYEE ACCOUNT #, WITH DIRECT MAIL TO EMPLOYEE'S	TIMING: IN PROGRESS - 1ST QUARTER '94
HOST PRINT MANAGEMENT • COMPRESS PRINT • PRINT DESTINATION COMPLEXITY	SEND HOST PRINT DIRECTLY TO ROU SERVER PRINT QUEUE SIMPLIFYING PRINT DESTINATIONS AND SOFTWARE CONFIGURATION ON ROU WORKSTATIONS	TIMING: IN PROGRESS BY IR TO CORRECT, WITH PILOT SCHEDULED LATER IN JANUARY WITH ROLL-OUT NATIONALLY AS SOON AS READY

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SYSTEMS

ISSUES	RECOMMENDATIONS	NEXT STEPS/TIMING
IR HELP DESK	800-741-7745 CURRENTLY IN PLACE FOR ROU TO CONTACT IR FOR ASSISTANCE; TO BE EXPANDED TO INCLUDE ALL APPLICATIONS AND SALES LOCATIONS	CURRENT PRACTICE
TO FULL-SERVICE HELP DESK	RECOMMEND ESTABLISHMENT OF A HELP DESK CONCEPT WHICH PROVIDES A DIRECTORY OF HOME OFFICE SUPPORT PERSONNEL FOR THE ROU	IDENTIFY PERSONNEL AND GENERATE THE STATED DIRECTORY; SECURE APPROPRIATE DEPARTMENT HEAD'S APPROVAL, AND PLACE/COMMUNICATE DIRECTORY ON-LINE VIA BULLETIN BOARD TIMING: 1ST QUARTER

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ADMINISTRATION

ISSUE	RECOMMENDATIONS	NEXT STEPS/TIMING
VOICE MAIL: RETAILER ACCESS TO SR'S/DM'S	VOICE MAIL SYSTEM HAS BEEN UPGRADED WITH A NEW FEATURE SCRIPTED FOR RETAILERS: 1-800-RJR TALK..THEN ENTER EMPLOYEE ACCOUNT NUMBER	ENSURE FIELD MANAGERS AND SR'S AWARENESS AND UNDERSTANDING: #'S SHOULD BE PROVIDED TO ALL "APPROPRIATE" CUSTOMERS ASAP TIMING: COMMUNICATION IMMEDIATE
PART-TIME HOURS AND MILES	SHORT TERM: UTILIZE ANSWERING MACHINE METHOD • ESTABLISH WEEKLY REPORTING • 2 LINES IF NECESSARY (PHONE MATE 6000 AND 7900 MODELS USE STANDARD CASSETTES) LONG TERM: ESTABLISH A "CONNECT" TYPE SYSTEM, KEYED BY EMPLOYEE ACCOUNT #, WHICH WOULD AUTO-LOAD LRS AND PROVIDE ROU A REPORT RECAP FOR REVIEW AGAINST DAILY CALL REPORTS	TIMING: IMMEDIATELY CONDUCT COST AND RELIABILITY ANALYSIS OF THIS METHOD TIMING: IN PROGRESS
STANDARDIZATION OF FORMS 51842 7854	ELECTRONIC FORMS SYSTEM PROVIDES STANDARDIZED FORMS ON-LINE EXPAND INDEX OF STANDARD FORMS TO INCLUDE NON-STANDARDIZED FORMS WHICH HAVE BEEN DEVELOPED FOR USE BY INDIVIDUAL REGION OPS UNITS	CURRENT PRACTICE FORWARD NON-STANDARDIZED FORMS TO MIKE JUDKINS; A BEST PRACTICES CONCEPT WILL BE USED TO ESTABLISH THE STANDARD FORMAT FOR PLACEMENT ON LINE TIMING: IMMEDIATELY

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ADMINISTRATION

ISSUE	RECOMMENDATIONS	NEXT STEPS/TIMING
LRS/SES: FOR DM'S AND CAM'S	SYSTEMS COORDINATOR SHOULD INPUT ALL REGION EMPLOYEE INFORMATION: LRS AND SES	ESTABLISH AS CURRENT PRACTICE TIMING: IMMEDIATELY
TYPED VERSUS HANDWRITTEN COMMUNICATION FOR FIELD MANAGERS	MANAGERS SHOULD LOOK TO HANDWRITTEN COMMUNICATION, VOICE MAIL, WORK-WITH ,AND BASED ON NECESSITY - -TYPED CORRESPONDENCE SHOULD BE A LAST RESORT	ESTABLISH AS CURRENT PRACTICE TIMING: IMMEDIATELY
FILES: ACCOUNTABILITY	• ROU MAINTAINS THE CENTRAL FILES • SALES/MARKETING PERSONNEL(W-S) MAINTAINS ALL EMPLOYEE PERMANENT PERSONNEL FILES • FIELD MANAGERS - PERSONNEL: MAINTAIN A FILE FOR EACH DIRECT REPORT, FOCUSED ON PERFORMANCE DOCUMENTS - BUSINESS: ACTIONABLE BUSINESS FILES (I.E., ACCOUNTABLE DIRECT AND CHAIN ACCOUNTS)	CURRENT PRACTICE
PDS TO TESSERACT	COMMUNICATION AND TRAINING FOR ROU/ COORDINATORS	TIMING: JANUARY 1994

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MISCELLANEOUS

ISSUE	RECOMMENDATIONS	NEXT STEPS/TIMING
EMPLOYMENT PRACTICES	COMMUNICATION PROCESS DM: INITIAL CONTACT IS RSM DM: THEN PROCEED BY CONTACTING APPROPRIATE EMPLOYMENT PRACTICE MANAGER ROM: NO ACTIVE ROLE	TIMING: IMMEDIATE
DIVISION OFFICE NEEDS (I.E. LEASE EXPIRATION)	• EXECUTIVE CENTERS FOR DM/ELM . . . WITH "DETACHED" STORAGE WARE-HOUSE SUPPORTING SALES REPS • REGION LOCATIONS: MAINTAIN DM/ ELM OFFICES WITHIN REGION COMPLEX	COMMUNICATE OFFICE GUIDELINES, LEASE SPECIFICATIONS TO FIELD TIMING: ASAP
REGION OPERATIONS MANUAL • UPDATE?	Q AND A: IS UPDATE NECESSARY?	
FOLLOW-UP TRAINING: ROU	SHORT-TERM: ROM IDENTIFY IMMEDIATE NEEDS AND COMMUNICATE TO APPROPRIATE WINSTON-SALEM SUPPORT GROUP LONG-TERM: DEVELOP QUESTIONNAIRE TO IDENTIFY STRENGTHS, WEAKNESSES OF THE ROU	TIMING: IMMEDIATE TIMING: 6 MONTHS
START-UP ISSUES 51842 7856	• NETWORK WITH CO-ROM'S (GOUDREAULT, GOODMAN) • TRIPS TO OTHER ROU'S	TIMING: ESTABLISH AS CURRENT PRACTICE

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MISCELLANEOUS

ISSUE	RECOMMENDATIONS	NEXT STEPS/TIMING
BEST PRACTICES PROCESS	ESTABLISH A POINT PERSON TO COORDINATE/COMMUNICATE BEST PRACTICES AND PROCEDURES WHICH STREAMLINE AND/OR ELIMINATE UNNECESSARY WORK	TIMING: IMMEDIATE AND ONGOING FORWARD BEST PRACTICES RECOMMENDATIONS TO MARK RODGMAN OR STEPHEN MACLEOD, SALES PERSONNEL
DO WE HAVE ADEQUATE RESOURCES TO RUN ROU? (4 COORDINATORS)	START-UP: UTILIZE PART-TIME LABOR FOR SPECIFIC TASKS AS NECESSARY LONG TERM: ASSESS WORK-LOAD ISSUES TO DETERMINE IF RESOURCES ARE ADEQUATE	TIMING: IMMEDIATE TIMING: 6 TO 9 MONTHS

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WORKPLAN DEVELOPMENT

ISSUES	RECOMMENDATIONS	NEXT STEPS/TIMING
PROMOTION DEVELOPMENT PROCESS	ALLOCATIONS DETERMINED BY: • BBU PROGRAM INTENT • BUSINESS DEVELOPMENT OPPORTUNITY • NATIONAL INDICATORS	• SALES PLANNING WILL COMMUNICATE RATIONALE FOR REGION ALLOCATIONS . . . BY PROMOTION • SALES PLANNING TO SIMPLIFY/UPDATE/ COMMUNICATE NATIONAL INDICATOR PROCEDURES TIMING: IN PROGRESS
PROMOTION ALLOCATION PROCESS	AVP/MARKETING: JOINT EFFORT ON STRATEGIC PROMOTIONAL DIRECTION SALES PLANNING, BBU'S, DIRECTORS OF AREA OPERATIONS: ESTABLISH REGION ALLOCATIONS REGION MANAGERS: UP FRONT PLANNING • DIVISION MANAGER, CHAIN ACCOUNT MANAGER "IN THE PLANNING LOOP," BUT NO ADMINISTRATIVE DUTIES • DM, CAM SELLS ALLOCATION (RETAIL, INDIRECT, AND DIRECT ACCOUNTS) REGION MANAGER/REGION OPS MANAGER: IMPLEMENTATION PROCEDURES REGION OPS MANAGER/PROMOTION COORDINATOR: ADMINISTERS ALLOCATION PROCESS, START TO FINISH, TO INCLUDE COMMUNICATION OF IMPLEMENTATION STATUS TO DIVISION MANAGEMENT	• CLEARLY COMMUNICATE ACCOUNTABILITIES AND PROCEDURES: EVALUATE AND REVISE AS NECESSARY... TIMING: IN PROGRESS "STANDARDIZATION" SHOULD BE THE GOAL FOR IMPLEMENTATION PROCEDURES

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